North America Crop Protection Chemicals - Market Share Analysis, Industry Trends & Statistics, Growth Forecasts 2019 - 2029

Market Report | 2024-02-17 | 241 pages | Mordor Intelligence

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Report description:

The North America Crop Protection Chemicals Market size is estimated at USD 14.97 billion in 2024, and is expected to reach USD 18.39 billion by 2029, growing at a CAGR of 4.20% during the forecast period (2024-2029).

Key Highlights
-The region's agricultural crop protection chemicals industry has been transforming over the years, with robust growth coupled with changing crop mix trends and environmental regulations. The region's countries primarily focus on the growing population, the decline in the total arable land, and food security to achieve higher agricultural output and boost the market studied.
-The past decade witnessed a reduction in the new pesticide active ingredients. This paved the way for an increase in off-patent pesticides in recent years. Biological pesticides emerged as an important segment of crop protection chemicals, as they register a minimal environmental footprint and are ecologically sustainable. According to the Food and Agriculture Organization (FAO), the region accounted for 198,840.1 thousand hectares of cropland in 2020, wherein the arable land accounted for 195,974.1 thousand hectares in the same year.
-Cover crops can help improve soil health, reduce erosion, and suppress weeds, as well as provide a natural way to control pests and diseases. By providing subsidies to encourage the planting of cover crops, the federal government is taking steps to support sustainable farming practices and reduce the reliance on chemical inputs. This is also a positive step towards ensuring food security in the long term. It's good to see partnerships between the government and farming organizations to support sustainable agriculture.
-Farmers primarily use neonicotinoids and chlorpyrifos as insecticides in Minnesota, United States. However, due to growing concerns about the harmful effects of synthetic insecticides, the state government restricted the use of neonicotinoids, mainly to ensure the permissible use of a bee-harming insecticide.

North America Crop Protection Chemical Market Trends

Rapid Adoption of Bio-Based Pesticides

- The prevalence of synthetic or chemical pesticides continues in the region. However, an emerging preference for biological pesticides has been observed in recent years, primarily due to the rapid adoption of sustainable agricultural practices, such as integrated pest management (IPM) techniques and organic farming. Empirical observations revealed that biopesticides act synergistically with other agricultural inputs as an important component under eco-friendly IPM programs. According to the Journal of the International Organization for Biological Control, in the year 2020, there were numerous developments in the commercialization of bio-nematicides in the United States the past few years. This will boost the growth of the market in the coming years.
- According to the Research Institute of Organic Agriculture (FiBL) statistics, the area under organic farming in the United States accounted for 2,326 thousand hectares. In Canada was recorded at around 1,417 thousand hectares in the year 2020. Canadian consumers are paying greater attention to purchasing high-quality and healthy products, especially organically certified products. Thus, the rising consumer concerns over food safety drive the consumption of organic products, leading to more use of biopesticides than chemicals.
- Growing concerns about personal health have led consumers to invest in organic products and to try new ones. The health implications associated with organic foods have become more important than ever as people look for ways to find overall wellness. Due to the growing demand for food safety and quality, biopesticides are gaining popularity in sustainable agriculture. The biopesticide sector has been driven by a growing awareness of sustainable food production, farmers' concerns about excessive chemical use, and the rising expense of chemical crop protection. According to the US Environmental Protection Agency (EPA), microbial pesticides accounted for around 36% of total biopesticides registered in the United States by the end of 2019. The large number of microbial pesticides registered in the country indicates a huge demand for these products.

Herbicides Dominates the Market

- Herbicides are chemical agents that kill or inhibit the growth of unwanted plants and invasive species, such as weeds, in the home or farm. Chemical herbicides have a significant advantage over mechanical weed control regarding ease of application, often saving labor costs. Glyphosate, 2,4-D, atrazine, glufosinate-ammonium, paraquat, pendimethalin, dicamba, fluroxypyr, and metolachlor are the commonly used synthetic herbicides. However, glyphosate is the primary driver of market growth. Glyphosate, sold under the brand name Roundup by Bayer, is the most widely used herbicide. It is a broad-spectrum, non-selective, systemic herbicide that accounts for 60% of the global market for non-selective herbicides.
- According to the United States Department of Agriculture (USDA), the usage of pesticides in the corn planted area has increased; with that, herbicides are most extensively used in 96% of planted acres, followed by fungicides and insecticides in the country. Hence, the market is estimated to experience substantial growth in the forecast period. According to FAO, the usage of herbicides is more in the United States, with 255,825 thousand metric tons in 2020, which is an increase compared to the previous year in the country, followed by fungicides and insecticides, which will drive the growth of the market in the country during the forecast period. However, many herbicides that are still widely used in the United States, in quantities ranging from tens to hundreds of millions of pounds per year, have been banned or are being phased out.
- Bio-herbicides that use microbes as biological weed control agents are also gaining popularity in integrated pest management techniques, along with synthetic herbicides. Although the segment constitutes only a small part of the industry, it is expected to grow significantly in the years to come. Various other major companies have launched new herbicides, particularly in the United States and Canada, which contain certain properties to be used in particular crops. Bayer CropScience and BASF are among the

leading players in the North American region that deal in pesticides. They are actively launching products and are involved in mergers and acquisitions to expand their businesses in this segment. Thus, the growing need to increase crop yield and quality, control crop yield losses due to weeds, and the growing demand for organic food and stringent government regulations toward chemical herbicides in the country are the major factors driving the bio-herbicides market.

North America Crop Protection Chemical Industry Overview

The North American Crop Protection Chemical Market is a highly consolidated market with few players cornering most of the market share. BASF SE, Bayer CropScience, Syngenta AG, Corteva Agriscience, and UPL USA are the prominent players in the market. These players are competing to hold a consistent share of the market. Mergers and acquisitions, partnerships, and expansions are some of the major business strategies adopted by the aforementioned major players. Major players in the market have extended their product portfolio and broadened their business to maintain their position in the market.

Additional Benefits:

- The market estimate (ME) sheet in Excel format
- 3 months of analyst support

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